CAPPS HR/Payroll & Financials — User Group Meeting Minutes
Thursday, March 25, 2021
9–11 a.m.
(Webinar Only)

I. **Welcome (Andrea Smith)**

- This is a webinar through Webex.
- User Group meeting materials will be posted on FMX.
  - To be added to the user group distribution list, email the CAPPS Governance and Communications team at CAPPS.CGC.BA@cpa.texas.gov

II. **Production Update: Financials Support Requests (SRs) (Anthony Martin)**

- **SR Summary and Trend Report**
  - The *CAPPS Financials Summary and Trend Report 03/25/21* document was reviewed.
    - In February, there were 533 active SRs with 138 in high priority status.
    - As shown on the trend chart, there were 329 SRs opened and 438 closed in February.
- **Governance Approved Enhancements**
  - The *CAPPS Financials Governance Approved SRs 03/25/21* document was reviewed. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
- **Required Maintenance**
  - The *CAPPS Financials Required Maintenance 03/25/21* document was reviewed. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
    - SR 19436 is a request to update the *USPS Interface* to avoid frequent failures that required agency and CAPPS support intervention.
    - This allows Journals to be loaded and error notifications to be generated and sent to users. This SR is now in *Hold* status.
    - This only affects agencies using USPS. Due to recent inclement weather, the User Acceptance Testing (UAT) dates have been extended until the end of March.

III. **Upcoming Vote: SRs Submitted to Governance (Tony Martin)**

- The **CAPPS Financials SRs Submitted to Governance 03/25/21** document was reviewed.
  - There is one enhancement submitted for vote this month: SR 21712, for the *Asset Management* module.
  - The request is to allow custodian name and employee ID to be entered at time of receipt. The proposed solution is to add the EMPID field to PS_RCV_LN_ASSET and have EMPID name changed to display only and track off the EMPID field.

IV. **Production Update: HR/Payroll Support Requests (SRs) (Andrea Smith)**

- **SR Summary and Trend Report**
  - The *CAPPS HR/Payroll Summary and Trend Report 03/25/21* document was reviewed.
    - In February, there were 697 active SRs with 69 in high priority status.
    - As shown on the trend chart, there were 468 SRs opened and 564 closed in February.

- **Governance Approved Enhancements**
  - The *CAPPS HR/Payroll Governance Approved SRs 03/25/21* document was provided to attendees but was not reviewed during the meeting because there were no SR status updates since the last User Group.

- **Required Maintenance**
  - The *CAPPS HR/Payroll Required Maintenance 03/25/21* document was reviewed. Updates since the last meeting are identified with an asterisk (*) and **bolded**.
    - SR 27458 is a Recruiting module and the solution removes the default status filter feature and let users select the filters. This ticket is in Acceptance Testing.
    - UAT begins on March 29 and continues through April 1. This ticket will go to production after April 1.

V. **Project Update: CAPPS Fiscal 2021 Financials Agency Deployment Project Dashboard (Nyguel Sanders)**

- The *CAPPS Fiscal 2021 Financials Agency Deployment Project Dashboard 03/25/21* document was reviewed.
- The project is green and on track for both the soft go-live date on Aug. 09, 2021 and the implementation date on Sept. 01, 2021.
- Key items:
  - This project is now at 69% completion.
  - The CAPPS team has concluded the configuration/prototyping sessions. Each agency has received assistance in the set-up and a demonstration.
  - *Train-the-Trainer* sessions are in progress.
  - The team continues with phase 2 of the system test.
  - To help identify and outline security with the deploying agencies the agency security worksheets are reviewed.

VI. **Project Update: CAPPS Fiscal 2021 HR Payroll Agency Deployment Project Dashboard (Karl Thomason)**

- The *CAPPS Fiscal 2021 HR Payroll Agency Deployment Project Dashboard 03/25/21* document was reviewed.
- The project is green and on track. The code move date is July 08, 2021. The implementation date is July 12, 2021.
- Key items:
  - This project is now at 62% completion.
  - Mock 4 conversion is near complete.
  - The Conference Room Pilot (CRP) session are being held at this time.
  - The team has completed the executive sponsor meetings for the second quarter.

VII. **Project Update: CAPPS Fiscal 2021 Recruit Agency Deployment Project Dashboard (Nyguel Sanders)**

- The *CAPPS Fiscal 2021 Recruit Agency Deployment Project Dashboard 03/25/21* document was reviewed.
- The project is green and on track. The implementation date is May 12, 2021.
- Key items:
  - This project is now at 84% completion.
  - The CAPPS team is preparing for Recruit and Agency UAT.
  - Configuration updates are being implemented, as needed.
  - Agency 306/TSLAC has their early go-live scheduled for April 7.

VIII. **Project Update: CAPPS Fiscal 2021 IAM Agency Deployment Project Dashboard (Diana Urban)**

- The *CAPPS Fiscal 2021 IAM Agency Deployment Project Dashboard 03/25/21* document was reviewed.
- The project is green and on track.
- The UAT dates are April 12 through May 21, 2021. The implementation date is June 7, 2021.

- Key items:
  o The project is now at 72% completion.
  o Build has been completed.
  o The environment integration with IAM continues.
  o The team is preparing for UAT.
  o Tasks related to Organizational Change Management (OCM) are ongoing.
  o Support preparations will continue.

IX.   **Discussion Topic: Financials SR Migrating to UAT (Darayle Knause)**
- SR 15244 is for the General Ledger workflow email. This ticket updates the email line (from name to CAPPS-DoNotReply). It is currently showing the creator's email address and the fix will resolve this.

X.   **Discussion Topic: IAM/TDIS Project Update (Chelsa Vinklarek, Daryn Burleigh)**
- The implementation of TDIS impacts all CAPPS users, since the IAM/TDIS login is the only way to access CAPPS once IAM is deployed. It is critical for each agency to ensure messaging is broadcast to all of its users.
- Key points include:
  o The IAM/TDIS implementation only alters the login process to enter CAPPS. System navigation and functionality are not impacted by this new security process.
  o Texas.gov Digital Identity Solution (TDIS) employee portal. Enrollment and initial set up are required.
  o All CAPPS users will receive an initial account enrollment email. Users must select the expiring link within 72 hours of receiving the email.
  o Users can launch CAPPS Application by clicking the CAPPS logo after registration is complete, using the My Service page.
  o A new TDIS tile will be added to Employee-Self Service Home page.
  o Delegated Administrators (DA) will be able to seamlessly navigate to the DA Console using a new tile located on Core Applications dashboard. Only DA users will have access to the tile.
    ▪ DA users will have a listing of all the users at their agency. They can use a search feature to locate a specific employee.
    ▪ DA users can complete these actions without CPA assistance: initial password reset email, unlock user account, and resend a new enrollment link to users who did not complete the account registration process.
    ▪ If the DA needs additional assistance they may contact CAPPS HR/Payroll Help Desk email (CAPPS.help@cpa.texas.gov) or call 512-463-2277 – option 3.
  o Employee portal – Employees can make password changes, add/change cell number for one-time passcode authentication and security question changes or updates on their own.
  o Anytime employees can complete an action via the Employee portal, they should be encouraged to do so.
  o Three major objectives for TDIS implementation during UAT: Script execution to ensure functionality is behaving as expected, test your normal business processes and procedures, and take on DA role as you would in production environment.
  o Two UAT kickoff sessions will be held — the first will be held April 6 at 1:30 p.m. and the second will be held April 7 at 9:30 a.m. Both sessions are providing the same information, so people only need to attend one session. The slide deck and FAQ from both sessions will be combined and sent out afterward.
  o UAT registration and testing begins on April 12.
  o There are 6 weeks of UAT— beginning on April 12 and continuing through May 21.
  o UAT acknowledgment is due by May 21. Agencies must respond in the SR ticket that will be opened for them.

- o Go-live is set for June 7.
- o Each agency needs to:
  - Designate UAT coordinators by April 1.
  - Confirm their agency DA.
  - Request new TX_SC_IAM_DELEGATED_ADMIN role via SRS by close of business on April 5.
  - Complete the required test scripts within the first 2 weeks of UAT.
  - Completed the suggested scripts within weeks 3 through 6 of UAT.
- o In each agency's SR, the CAPPS team will list current users with password reset roles and a spreadsheet of required and suggested scripts to test.

XI.   Upcoming Meetings

- Tuesday, April 27, 2021 — CAPPS HR/Payroll User Group meeting.
- Thursday, April 29, 2021 — CAPPS Financials User Group meeting.